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ABSTRACT

To help reduce shortages of pretrained individuals that could occur in the event of a full national mobilization, the Army established a retiree recall program in 1981. The September 1992 exercise at Ft. Riley was one in a continuing series of "Certain Sage" exercises to evaluate the effectiveness of the system. Exercise participants filled duty assignments corresponding closely with those they would likely fill during an actual mobilization. Evaluation instruments included the following: a retiree skill questionnaire, daily observation report (evaluator work sheet), evaluator's questionnaires on participants and on duty position and counterpart, supervisor/counterpart evaluations of exercise participant and of duty position, and participant's exercise evaluation questionnaire. Findings indicated that most retirees felt confident they had retained the ability to perform well. Retirees gave adequacy of the inservice job orientations and continuity files high ratings, whereas their active duty supervisor/counterparts and the evaluator rated them somewhat lower. Rankings for the value of the orientations and continuity files closely paralleled those for adequacy. Supervisor/counterparts tended to rate overall performance of duty highly. Retirees and evaluators were slightly more critical. The challenge identified for the Army was to keep in contact with those retirees most likely to be recalled during a national emergency and to maintain their readiness. (YLB)

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**Lessons of Exercise Certain Sage '92
at Ft. Riley, KS
From An Adult Educator's Perspective**

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To help reduce shortages of pretrained individuals that could occur in the event of a full national mobilization, the Army, in 1981, established a retiree recall program. Since that time, installations and organizations both in the U.S. and certain Military Communities (MILCOMs) in Europe have periodically hosted "Certain Sage" exercises. The September 1992 exercise at Ft. Riley, was another in that continuing series to evaluate the effectiveness of the system.

The exercise was conducted concurrently with two major events at Ft. Riley: deployment of 1st Infantry Division (M) troops to REFORGER 93 (Return of Forces to Germany) and an annual retiree open house and health fair. Exercise participants, therefore, had an opportunity to fill duty assignments (in most cases) corresponding closely with assignments they likely would fill during an actual mobilization.

Objectives of the exercise were to:

- 1) Evaluate the effectiveness of recalled retirees in assisting with the deployment of 1st Infantry Division (M) troops.
- 2) Evaluate the effectiveness of recalled retirees in performing medical evaluations and other garrison support activities.
- 3) Evaluate the effectiveness of sample duty orientations, job descriptions, and continuity files ("battle books") prepared by host activities in helping recalled retirees to perform effectively in their respective unresourced duty positions (coded "MQ") as listed in the MOBTDA.
- 4) Exercise the Joint Uniform Lessons Learned System (JULLS) procedures outlined in the Fort Riley Installation Deployment Support Plan (IDSP) for identifying and resolving problems, documenting solutions, and refining plans and procedures.
- 5) Evaluate inprocessing procedures at the installation and activity level.
- 6) Evaluate the medical condition of recalled retirees.
- 7) Evaluate installation/activity management of the retiree preassignment and recall program.
- 8) Evaluate the skill retention of retirees.

9) Heighten awareness of the retiree recall program at all levels.

All retirees recalled were volunteers. As initially planned, all participants would have lived in the immediate vicinity of Ft. Riley and held national emergency mobilization ("hip pocket") orders to that installation. However, invitations to participate did not elicit adequate response. A larger cohort of volunteers was identified when the "hip pocket" order stipulation was lifted and the invitation was extended to retirees living farther from Ft. Riley.

Upon completion of in-processing, individual retirees were dispatched to host units to begin their two-week assignments. Nine different directorates, activities or organizations hosted one or more of the 23 participating retirees. As provided in the exercise operations order, each retiree was to be given a duty assignment orientation (briefing, tour, continuity file [battle book]) for the respective positions. The orientations ranged from the lengthy and detailed to the brief and cursory. (It must be noted that some retirees returned to positions from which they had retired relatively recently and one filled the same position he held in retirement as a DAC employee.) Similarly, continuity files ranged from hurriedly gathered file folders to multiple three-ring binders.

HQDA guidance for the Certain Sage exercise included drafts of three very short questionnaires. A skills inventory and an end-of-exercise evaluation, both consisting of only six items, were designed to be completed by participating retirees. The third questionnaire was a participant evaluation, to be completed by the retiree's supervisor.

In order to provide a comprehensive evaluation of the exercise and quantify results wherever possible, the evaluators, in consort with the exercise project officer, not only expanded upon the questionnaires requested by HQDA, but also developed several additional instruments. Instruments used during the exercise included: a Retiree Skill Questionnaire, a Daily Observation Report [Evaluator Work Sheet], Evaluator's Questionnaire on Exercise Participants, Evaluator's Questionnaire on Duty Position and Counterpart, Supervisor/Counterpart Evaluation of Exercise Participant, Supervisor/Counterpart Evaluation of Duty Position, and

Participant's Exercise Evaluation Questionnaire. Because most of the instruments were developed only shortly before the exercise began, there was no time to validate any of them.

For purposes of this presentation, only selected results will be discussed. (For a full assessment of the exercise, see "Retiree Recall Exercise Certain Sage 92, After Action Report," prepared by Mobilization Plans Division, Directorate of Plans, Training, and Mobilization, Fort Riley, Kansas 66442-6516.)

From the perspective of an adult educator, several of the "demographic" characteristics of the retirees were highly informative.

Length of retirement ranged from one to 19 years. However, most retirees felt confident that they had retained the ability to perform well in the MOS held at retirement; on a 10 point Likert scale, the mean perceived level of competence was 7.2. A majority were employed full time (20/28), predominantly in skilled trades (7) and retail sales/management (5); other prominent occupational areas were the service sector (3) law enforcement/security (3) and education (3). A large majority (18/28) reported having acquired new skills, training, education or experience since leaving the service. Of those, four had earned BS and/or MS degrees, two had attended vocational-technical colleges and four reported participation in various forms of in-service adult education. If reactivated in a national crisis, a majority (16/27) felt the most suitable assignment would be the position from which they retired or a closely related area. Approximately half felt they would need refresher training.

Perceptions of the retirees, their supervisor/counterparts, and the evaluators were used in assessing overall exercise results.

The retirees gave adequacy of the in-service job orientations and continuity files high ratings while both their active duty supervisor/counterparts and the evaluators rated them somewhat lower. Using a seven point Likert scale (1 = low, 7 = high), the median retiree rating was 6; the median for supervisor/ counterparts was 5, and for evaluators it was 4.

The rankings for the *value* of the orientations and continuity files closely

paralleled those for "adequacy." The median ranking for both retirees and supervisor/counterparts was 6 (respective means were 5.3 and 5.6); median ranking by the evaluator team was 4 (mean 3.9).

In the matter of perceived demonstration of technical skills, both the retirees and evaluators were in general agreement. The median for both retirees and evaluators was 6; the respective means were 5.5 and 5.0. Interestingly, the median for supervisor/counterparts on this issue was 7 (mean 6).

Supervisor/counterparts tended to rate overall performance of duty highly. Their median ranking was 7 with a mean of 6.1. The retirees and evaluators were slightly more critical. Median of the retirees was 5 (mean 5.3); median for evaluators was 6. (mean 5.3).

Six retirees and one supervisor/counterpart felt that no refresher training would be needed if retirees were mobilized. However, most retirees, as well as most supervisor/counterparts and the evaluators, felt that some on-the-job training would be required. Four retirees felt that one to two weeks of on-post schooling would be needed to renew needed competencies.

Results of this exercise raise several critical issues for military adult educators.

Should the U.S. ever again need to mount a large (or worse still - full) military mobilization, it is a relatively safe bet that retirees will be among those to whom the call is issued. How likely is it that retirees are going to be needed? Some were recalled as recently as 1990 to fill requirements generated by Operation Desert Shield. Another operation of this - or larger - magnitude will almost certainly require some utilization of retiree personnel assets. The issue becomes, will those retirees be prepared to step into critical roles at whatever level needed and function effectively? Which branch and MOS categories will be most needed?

The range could be relatively small (e.g. health care, chaplains), but could be substantially more broad, depending upon circumstances at any given mobilization site.

Assuming that some retiree assets may be needed, other issues also must

be addressed. If retirees are to be factored into mobilization plans, consideration must be given to skill retention. The question becomes, What options are available to ensure that recalled retirees can be fully utilized as soon as possible after mobilization? How can the Army effectively monitor post-retirement acquisition of education or skills that may have been acquired by retirees? These could heavily impact the Army's capability to maximize utilization of retiree personnel in critical positions. Can retirees be encouraged to voluntarily maintain at least minimal levels of MOS competency? Would such an approach be cost effective?

The list of questions relating to this issue could be protracted considerably, but to no useful purpose. Assuming that the Army may need to recall at least some retired personnel in a future national emergency, the pivotal question is, "What can we do to be prepared?"

There is no easy answer, but there is a clear challenge for military adult educators. Methods need to be devised to keep in contact with at least those retirees most likely to be recalled during a national emergency. For some retirees, the prospect of recall to military service is repugnant (at best) and will be viewed quite negatively. However, this is not true of most participants in both Certain Sage 92 and other Certain Sage exercises. Most have expressed both interest and willingness to have continued contacts with the Army, maintain appropriate military skills, and keep a high level of readiness -- with minimal cost to the Army!

Recognizing that there is a dedicated, motivated segment of the retiree force, the challenge for adult educators of the Army is to reach at least that cohort with sound, practical, timely information. This would help ensure that targeted retirees would have a high level of readiness in the event of a national emergency.

One approach to achieving this would be a multi-media outreach program. (Perhaps it could be called "Operation I'm Ready".) Equipment updates, procedural and regulation changes, and other pertinent information could be presented in a variety of formats: videotapes, audio tapes, CD-ROMs, printed materials, briefings conducted concurrently with on-post retiree events, and so on.

Obviously, there would be resource impacts in implementing such a

program. To minimize fiscal impacts, the program could be piloted over a three to four year period at a small number of selected installations or within segments of MACOMs. This also would help facilitate the comprehensive evaluation that would be needed to determine potential long-term efficacy of the program.